

ARCHDIOCESE OF LOUISVILLE FOOD SERVICE HANDBOOK



ARCHDIOCESAN FINANCE DEPARTMENT

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ADMINISTRATION

NATIONAL SCHOOL LUNCH PROGRAM

The purpose of the National School Lunch Program (NSLP), as declared by Congress in the National School Lunch Act, is to safeguard the health and well being of the nation's children. Since 1946, President Harry Truman established the NSLP program to make it possible for schools to serve nutritious lunches to students each school day. States receive federal reimbursement and other assistance in establishing, maintaining, and operating the programs.

The Food and Nutrition Service (FNS) of the United States Department of Agriculture administers the NSLP at the federal level. In Kentucky, the Department of Education and the Department of Food Distribution, administers foods to the programs, which are available in archdiocesan schools through an annual agreement with the Food Service Office of the Chancery Finance Department.

To participate in the NSLP, all schools and institutions must agree to:

- Operate food service for all students without regard to race, color, national origin, sex, age, or handicap.
- Provide free and reduced-price lunches to students unable to pay the full price, based on income eligibility criteria. Such students must not be identified nor discriminated against in any manner.
- Serve lunches that meet the nutritional standards established by the Secretary of Agriculture.
- Operate the food service on a nonprofit basis.

To qualify for reimbursement, schools must serve lunches that meet federal guidelines. The meal pattern requirements specified by the Archdiocese of Louisville Food Service Office are the Enhanced Food Pattern. The lunch pattern is designed to provide, over a period of time, approximately one-third of a student's Recommended Dietary Allowances (RDA's) for key nutrients. The lunch must be planned to offer each student five items: a specific amount of meat or meat alternate, two or more vegetables and/or fruits, whole-grain or enriched bread or bread alternate and fluid milk as beverage. Minimum amounts of food items are specified for various age/grade groups. Schools and institutions may expand on these amounts and add more food items at their discretion. To encourage consumption and promote participation, schools should serve a variety of foods and types of milk, taking students' preferences into account.

Students must be offered all five-food items required by the lunch meal pattern. However, under the Offer Versus Serve option, a student may decline up to two food items. The price of lunch is not reduced when items are declined.

Schools are required to promote activities involving students and parents in such areas as menu planning, forming taste test panels, enhancing the eating environment, promoting the program and organizing joint student-community activities supporting the program. Schools are encouraged to teach students about good nutrition practices, and to involve the school faculty and the general community in activities to enhance the program.

By law, students of families meeting specified income criteria receive lunches free or at a reduced price. Eligibility determinations are made by a determining official at each school, and are based on family size and income information provided on an application submitted by a parent or guardian. Participating schools and institutions supply information to parents and the news media each year to explain how families may apply for free or reduced-price lunches. The school must ensure that students who receive free or reduced-price lunches are not overtly identified by the use of special tickets or by any other means. Such students are not required to work for their lunches, do not use separate dining facilities or lines, and do not have a different choice of lunch from those students who pay the full price.

A basic amount of federal financial assistance is provided for all lunches served, whether paid, reduced-price, or free. Additional financial assistance is provided for each reduced-price and free lunch served to eligible students. These rates of reimbursement are adjusted annually in accordance with changes in the Consumer Price Index. The Department of Agriculture also provides donated commodities for lunches served under the program, and technical assistance and guidance to assist state agencies and schools in operating the program.

NATIONAL SCHOOL BREAKFAST PROGRAM

The purpose of the School Breakfast Program (SBP) is to provide high-quality and nutritious breakfasts to all students at the lowest possible price. In response to research linking the implementation of a school breakfast program to improved learning and classroom behavior, Congress enacted the School Lunch and Child Nutrition Amendments of 1986 which improved the nutritional requirements, increased the federal subsidy, and extended an "Offer Versus Serve" option to the Breakfast Program.

All participating schools and institutions must agree to:

- Operate food service for all students without regard to race, color, national origin, sex, age, or handicap.
- Provide free and reduced-price breakfast to students unable to pay the full price, based on income eligibility criteria as in the NSLP. Such students must not be identified nor discriminated against in any manner.
- Serve breakfast that meets the nutritional standards established by the Secretary of Agriculture.
- Operate the food service on a non-profit basis.

The breakfast meal pattern is designed to provide the student with one-third of the RDA for key nutrients and calories. The breakfast must be planned to offer each student items: a specific amount of meat/meat alternate, a whole-grain or enriched bread/bread alternate, a full-strength juice, fruit or vegetable and fluid milk. Minimum amounts of food items are specified for various age/grade groups. As with lunch, the local facility may expand on these amounts and add more food items at their discretion.

Under Offer Versus Serve, in order for a breakfast to be reimbursable, all four food items must be offered (made available) to all students in the required portion sizes. The student must be allowed, however, to refuse any one food item that he/she does not intend to eat. The refused item may be any of the four items offered. The price of the meal to the paying students is not reduced when an item is declined.

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ADMINISTRATION OF THE PROGRAM

Role of the Food Service Director

- **Approve applications for free and reduced price meals and distribute an updated master list of eligible students to programs.**
- Serve as the verification official for free and reduced price meal applications.
- Process Policy Statements and Agreements with the USDA – Department of Education, Division of School and Community Nutrition and Division of Food Services.
- Annually visit and review each program for compliance with all federal regulations, all local and state health ordinances, and all archdiocesan policies designed to promote cost-effective, sanitary and high quality food programs.
- Implement the process of an annual required system-wide audit.
- Analyze monthly program reports and recommend corrective action, where necessary, to prevent loss. Provide consultation to local parish/school personnel.
- Provide managers opportunities for professional development through training sessions and in-service workshops.
- Promote nutrition education opportunities between faculty and food service staffs.
- Develop and maintain an Archdiocese of Louisville School Food Service Handbook.

Role of the Principal

- Oversee the management of the school lunch/breakfast programs within the school at the local level.
- **Distribute applications for free and reduced price meals to each family at the beginning of the school year or at any time during the school year when new students enter the school or the family income changes may affect eligibility.**
- Maintain a file containing the current annual policy statement, all free/reduced price applications and an updated master list of eligible students. These records must be kept on file for three years plus the current year.
- Ensure the financial records of the program are reviewed on a regular basis.

FOOD DISTRIBUTION PROGRAM

All schools and institutions participating in the National School Lunch and Breakfast Programs receive commodity foods through the Food Distribution Program (FDP) of the United States Department of Agriculture. These foods are purchased by USDA and donated to the Child Nutrition Programs in order to improve the nutritional quality of the meals while controlling food cost and, in addition, to support agriculture through price support and surplus removal programs.

USDA and the Kentucky of Agriculture administer the FDP through agreements made annually with the Food Service Office. The Kentucky Department of Agriculture arranges delivery of such goods, by contract with a local distributor. A delivery fee is agreed upon by those parties and must be paid by the program upon receipt of the foods.

The National School Lunch Act mandates a per-meal commodity assistance rate for schools participating in the NSLP. This rate is adjusted annually. The Archdiocese of Louisville Food Service Program's allocation of commodity foods is determined by multiplying the mandated assistance rate by the number of lunches served during the previous year.

Commodities generally available for the NSLP include frozen and canned meat and poultry; canned, fresh and frozen fruits, vegetables, and juices; dairy products, cereals and grains; vegetable oil and shortening; and peanut products. The USDA expects schools and institutions to use these foods in the preparation of food items or side dishes of the school lunch or breakfast program.

A program may operate a breakfast program, sell a la carte items, adult meals, or contract to provide snacks or meals to other groups; no such meal service outside the School Lunch Program will influence the total amount of commodity foods allocated to a program.

The school or institution is, at all times, accountable for all USDA foods allocated to the facility. Adequate security and proper storage must be maintained. Complete records of the use and disposition of all foods must be available at all times. Penalties are assessed for the loss or misuse of donated foods.

In the event, a school or institution finds that there is a surplus of a particular USDA food item or it is not well accepted within the lunch/breakfast program, the food may be used in the following ways.

Transfer – Food may be transferred to another school lunch program within the Archdiocese of Louisville. The transfer of products to any facility other than an Archdiocesan School Lunch Program is prohibited unless authorized and coordinated by the Food Service Director of the Archdiocese of Louisville.

OFFER VERSUS SERVE PROVISION

In 1976, Congress amended the National School Lunch Program to include the Offer Versus Serve Provision. This change recognized that not all students would consume the entire lunch on a given day. It allows the student to adjust the meal to meet his or her own individual appetites and food preferences, thus reducing food waste.

As implemented in the schools of the Archdiocese of Louisville, the requirements of the Offer Versus Serve Provision are:

A. Lunch

1. All five-food items must be offered to all students.
2. The serving sizes must equal the minimum quantities required for the age group being served.
3. The lunch must be priced as a unit and the students may take 3, 4, or all 5 items at the same price.
4. Students have the option to decline foods and be aware of the policy of Offer Versus Serve.
5. The meal must be monitored for compliance minimum of three food items at the end of the serving line.
6. A menu item may contain more than one food item (i.e., pizza, sandwiches or spaghetti with meat sauce), or a single food item may be contained in two menu items (i.e., soup and sandwich) where the meat requirement is contained partially in the soup and partially in the sandwich. In the latter case, both menu items must be taken for the food item to count as a full food item.
7. The student may decline or take a smaller portion of one or two of the food items offered.

B. Breakfast

1. All four-food items must be offered to all students.
2. The student may decline or take smaller portions of only one of the food items offered.
3. All other regulations of Offer Versus Serve as described above for the NSLP apply also to the SBP.
4. Double portion of the bread/bread alternate or meat/meat alternate may be counted as two food items.

The Offer Versus Serve Program should be assessed regularly to assure contentment with student satisfaction. Points to watch for consistency but not limited to:

- Student acceptance of offered components/items
- Quantities needed vs. overproduction
- Plate waste by students
- Food costs
- Timeliness of progression in line

PRE-COSTING MEALS

The Central Food Service Office will provide the pre-cost to the managers by August 31st of each year. The pre-cost is used to complete the Allocation of Production Cost (Schedule 5-M). A copy **must** be maintained in each monthly folder.

PROCUREMENT PLAN

The Food Service Central Office and all schools in the archdiocese that are on the National School Lunch/Breakfast Program(s) must purchase equipment, food and other items for use in the program using the following procedures:

Equipment – Obtain quotes from a minimum of three suppliers on any purchase exceeding \$1,000.00. Maintain written record of phone quotes and copies of all written quotes in the program file. Submit Request to Purchase Equipment form and three bids to Central Food Service Office for approval. Purchase from the supplier with the lowest price assuming quality and service are acceptable. Document in the file the reason for a decision to purchase from any supplier other than one submitting the lowest price quote.

Food and Supplies

1. If the total amount of purchase for like items exceeds \$10,000.00 in a year, the following formal bid procedures must be implemented according to federal policy.
 - A. The Archdiocese School Food Service Program participates in a purchasing coop and invites area vendors to submit bids for milk and branded pizza. Specifications and bid applications should be provided to all potential bidders.
 - B. A successful bidder must have proven (or believable) record of service, particularly with respect to delivering all items on a regularly scheduled basis, at favorable prices. A distributor may be designated as unacceptable if the requirements listed herein have been previously violated and/or poor communications exist between the seller and the school district.
 - C. The Food Service Office provides each program with listed prices **from the Group Purchasing Organization** for commonly purchased items.
2. Non-competitive negotiations may be used to purchase items under the following circumstances:
 - A. If an item is available from one single source.
 - B. When a one-time purchase of a new food item is made in order to determine student acceptance or when sample food items are purchased for testing.

Procurement Records – The following records must be maintained for three years plus the current year:

1. Records of all phone quotes.
2. Logs of all emergency and non-competitive quotes.
3. All written quotes and bid documents.
4. Dated Market Order comparisons.

Procurement Conduct – The following conduct will be expected of all persons who are engaged in purchasing for the school lunch/breakfast program.

1. No employee may purchase food from a vendor without using one of the procedures described above.
2. Conflicts of interest (dealing with friends, family members, other parishioners, etc) are forbidden if executed without using the prescribed procedures.
3. Employees of the school lunch/breakfast program may neither solicit nor accept gratuities, favors, or anything of monetary value from vendors for personal use.
4. The placement of vendor orders through the lunch/breakfast program by individual staff members, other individuals, or groups within the parish is not permitted. In the event the manager does not place such an order, it must be on a separate invoice and paid COD or presented directly to the individual or group for payment. The payment for such non-program expenses must not be processed through the food service program account.

The removal of any cash, food, supplies, equipment, or other program property such as recipes, recipe books, and the like is prohibited.

RESPONSIBILITIES FOR CHILD NUTRITION PROGRAMS

CENTRAL FOOD SERVICE OFFICE AUTHORITY LEVEL

At the local level, each school food authority (SFA) is responsible for:

- a) Serving quality meals that meet the USDA meal pattern to students.
- b) Submitting the SFA's policy statement for provision of free and reduced price meals and providing copies of SFA's approved policy statement to all participating schools.
- c) Distributing copies of Applications for Free and Reduced Price Meals together with copies of the state administrative guidance materials to all participating schools.
- d) Distributing, at the beginning of each school year, Applications for Free and Reduced Price Meals to each student enrolled in school.
- e) Reviewing and approving, in accordance with state administrative guidance materials, each application for Free and Reduced Price Meals.
- f) Verifying, with the applying parent, any incomplete, illegible or questionable information entered on the Application for Free and Reduced Price Meals.
- g) Approving all eligible complete applications and denying all applications which do not meet eligibility guidelines. Such approval or denial must be entered on the applications in the appropriate areas after completed application has been returned to the schools.
- h) Ensuring that all children within a family in the SFA receive the same benefits.
- i) Developing and implementing appropriate hearing procedures and implementation of a standard review procedure to be used in the approval of applications for Free and Reduced Price Meal; monitoring school procedures in the approval of Applications for Free and Price Meal; collection procedures for meal payment, point of service count and avoidance of overt identification of needy children.
- j) Developing and implementing a verification procedure to confirm eligibility for free and reduced price meal recipients.
- k) Establishing a procedure for obtaining accurate meal counts at the point of service so that accurate reports of daily student participation by category are maintained.
- l) Maintaining all records pertaining to child nutrition programs (including menus, production records, invoices, bills, financial reports, and inventories) for three years plus the current school year.
- m) Submitting monthly reports and claim for reimbursement in a timely manner to the state office.
- n) Securing an annual audit in accordance with the Single Audit Act of 1984.

- o) Reviewing and approving building and renovation layouts, plans, and purchasing contracts; reviewing major food service equipment purchases; developing, implementing, and maintaining an inventory control of food service equipment.
- p) Establishing and implementing purchasing procedures in compliance with state and federal regulations.
- q) Establishing standard procedures for maintaining inventories of purchased and government-donated foods and supplies.
- r) Developing and implementing a viable financial management system which meets state and federal regulations.
- s) Planning and/or approving school food service menus prior to and during service to ensure that all nutritional requirements are met.
- t) Providing assistance to school food service personnel in planning menus that provide choices within the required meal components to students.
- u) Providing alternate meal services (plate lunch and box lunch, salad plate and regular plate lunch) to increase participation.
- v) Organizing student advisory councils to assist in menu planning, publicity, and observance of special days in the cafeteria.
- w) Maintaining a regular schedule of on-site visits to participating schools; monitoring and scheduling follow-up visits to school to ensure program compliance; accompanying state and/or federal representatives on local school visits.
- x) Providing technical assistance to school food service personnel.
- y) Developing and implementing an ongoing training program for food service personnel, school clerical personnel and school administrators.
- z) Developing standard policies regarding employment practices, grievance procedures, supervision and training of food service personnel.
- aa) Maintaining liaison with parents, students, community groups and the administration to promote good public relations.
- bb) Remaining informed concerning federal and state regulations and policies concerning various child nutrition programs.

FINANCIAL POLICY

FINANCIAL POLICIES AND PROCEDURES

The operation of a federally subsidized meal program within the parish/school requires, by terms of an annual agreement between the Division of School and Community Nutrition Services, Kentucky Department of Education and the Archdiocese of Louisville, that the following conditions be satisfied:

1. Revenue accruing to the program must be used only for the operation or improvement of the program. Provided that such revenue shall not be used to purchase land or buildings or to construct buildings.
2. "Revenue" when applied to this program means all monies received by or accruing to the nonprofit school food service including, but not limited to children's payments, earnings on investments, other local revenues, state revenues and federal cash reimbursements.
3. A system of financial management must be maintained in accordance with procedures established by the state agency and local Archdiocese of Louisville Financial Policies and Procedures.
4. Full and accurate records of operation must be maintained for a period of three years plus the current year.
5. All such records must be made available, upon request, to the state agency, USDA or the Food Service Office - for audit or review.

The Food Service Office of the Chancery Finance Department is responsible for the implementation, monitoring, and accountability of the financial policies and procedures described on the following pages. In addition to policies in this section, programs are subject to all policies contained in the Archdiocese of Louisville Financial Policies and Procedures Manual. These policies have been issued to enable local programs to comply, in an efficient and reliable manner, with all federal regulations pertaining to the operation of a school lunch/breakfast program within the school.

Any equipment purchased over \$1,000 by the National School Lunch Program must obtain three quotes on the exact item, complete the Request for Purchase or Lease of Equipment and submit to the Central Office for approval. Maintain copies of written quotes in the program files.

All equipment and non-perishable supplies purchased by the school lunch/breakfast program must be safeguarded from theft or damage. Because the kitchen and cafeteria are frequently used for parish/school functions outside of the school food service program(s), it is strongly recommended that the parish/school utilize guidelines and a written agreement for the safe and proper use of the equipment and the facility.

If a National School Lunch/Breakfast Program closes, all money, inventory and equipment purchased with food service monies must stay within the National School Lunch Program funds.

ADMINISTRATION FEE

The Food Service Office at the Chancery charges each program administered a monthly fee for administrative and related cost which will be the same all year.

The number of students attending the school determines this fee. This process must be analyzed each year to determine budget needs of administering the program(s). The fees are calculated and communicated to the principal and manager/bookkeeper during March of the preceding school year.

BANK DEPOSIT

All receipts for the cafeteria must be deposited directly into the cafeteria general checking account. The deposits are to be posted to the funds restricted for the cafeteria. Two people must count deposits and sign or initial the deposit form. Deposits must be made daily.

USDA reimbursements will be automatically deposited into the cafeteria checking account. An e-mail will be sent to report when deposit has been made.

To record direct deposit, debit cash and accounts payables (administration fee) and credit accounts receivable (USDA reimbursement).

BUDGET PLANNING

All cafeteria programs are required to prepare an annual budget. The Parish Council must approve the budget. This budget should forecast receipts and expenditures for the fiscal year beginning July 1st. The PDS Ledgers/Payables Program has a good budget preparation schedule. These forms should be used to assist the budget preparation process. The Central Food Service Office provides a budget preparation package in March of each year.

Cafeteria budgets for the following year must be submitted to the Food Service Office by the first Friday of April each year.

Deficit budgets should be avoided. However, if the cafeteria approves a deficit budget, a letter of explanation as to how the deficit will be funded must accompany the budget.

CASH RESOURCES – USE OF FUNDS

The Archdiocese of Louisville Food Service Office, as the School Food Authority, is responsible for the safeguarding of all funds accruing to its school food service programs. The School Food Authority has established the following policy for safeguarding use of funds as per State and Federal Guidelines, and Audit Recommendation (Reference 702 KAR 6:075).

All revenue received by the school food service program shall be used only for the operation or improvement of the school food service program. This includes, but not limited to, funds received as payments for meals by students and adults, federal and state reimbursement, and any interest earned on deposits of federal and state reimbursements. Such funds shall not be used to purchase land, buildings, or to construct buildings, or for capital improvements on existing buildings. To this end the following guidelines have been established.

REIMBURSEMENT TO PARISH

The National School Lunch Program is to be self-supporting. The parish, for overhead expenses from which the National School Lunch Program benefits, (i.e., utilities, trash removal, telephone and pest control) will assess the program. The State has assigned an indirect cost rate of 10% to private schools based on the cost of direct labor plus employee fringe benefits, i.e., FICA, Workers Compensation, FLEX, and Retirement. An indirect charge is required from the National School Lunch Program to compensate the parish/school for overhead expenses. Therefore, when indirect charges are recovered, the parish/school may not charge the National School Lunch Program for utilities, garbage, or shared telephone line. The only exception to this policy is if the cafeteria has a separate utility meter.

A program must contact the Central Food Service Office prior to and consult with throughout any renovations to cafeterias or kitchens if partial payment (in excess of \$1,000) for such renovations is expected to be recovered from school food service funds. It must be recognized that the school lunch program shares in such facilities and therefore should burden some responsibility for such over head.

Refer to Procurement Plan for Policy Guidelines relating to purchases in excess of \$1,000.

All payroll related cost – employee benefits, i.e., retirement, FLEX, workers compensation, and the employer's share of FICA are employer costs which will be recovered from program funds.

REIMBURSEMENT TO EMPLOYEES

Professional development and training of school food service personnel are legitimate uses of school lunch/breakfast funds. Employees who attend professional workshops or in-service may be compensated for their mileage. Documentation of time and mileage must be maintained in the monthly file/folder.

Employee expenses for overnight travel to attend State Meetings or Conferences must receive prior approval from the Food Service Director. The Food Service Director will announce the pending conference date, seeking inquiry from interested managers desiring to attend. Approvals for the American Food Service Association Conference will be based on membership of the association, ADP, financial status of program, overall program operations (paperwork, attendance and participation in meetings), and approval from pastor and principal. The program may pay travel and daily food stipend expenses as well as registration and lodging. Receipts for all conference related expenses must be maintained in the monthly file/folder.

CHARGES

POINT OF SALE SYSTEM

Charges are accepted under the Point of Sale system not to exceed 5 meals, after which, an alternative meal is provided. Students will not be allowed to charge A la carte items.

If there are not enough funds in the students' account to pay for the purchase, press <CHARGE>. This will charge the amount due to the student's account resulting in a negative balance. (The charge limits are set in the Eligibility Matrix to accept no more than five meals).

Letters are automatically generated to students whose account balances are below a certain level and whose prepaid meal counts is low. Archdiocesan policy requires that statements be mailed at least once a month to all parents. If necessary, statements can be mailed more frequently.

DISBURSEMENTS

Normally, all expenditures should be paid by check. Only in extreme circumstances should cash be used to pay bills and receipts for such expenditures are a **must**.

The cafeteria checks should be stored on parish property in a locked safe or secure file cabinet.

Signatures

The original hand signature of the pastor or associate pastor is required on every check drawn on cafeteria accounts except as indicated below:

- Checks over \$5,000 must have two signatures, one being the pastor or the associate pastor. The parish bookkeeper should not be authorized to sign or countersign checks.
- Checks written from imprest checking accounts do not require the pastor's signature. (However, the reimbursement check does require the pastor's signature.) Please refer to the policy entitled *Imprest Accounts (see Archdiocese of Louisville Financial Policies and Procedures Manual)* for further instructions.
- The pastor may appoint two individuals to sign jointly in his absence. The parish bookkeeper should not be authorized to sign or countersign checks.
- Signature stamps or other check signing devices may not be used without the approval of the Archdiocesan Chief Financial Officer. Requests must be made in writing.
- Blank checks should never be signed in advance of preparation.

Exceptions to the above must be approved by the Chief Financial Officer. Requests for exceptions must be made in writing.

Purchase/Payment Procedures

Following are suggested procedures to be used for making purchases and paying invoices/vouchers.

1. The parish may want to consider the use of purchase orders for purchases other than normal monthly expenses such as utilities. For example, the parish may want to set certain restrictions on what purchases require an advance purchase order prior to payment. These may include items that were not in the budget, over a certain dollar limit, or for a special project. The purchase of these goods or services should not be permitted without following these procedures:
 - Preparation of a purchase order, which would include the quantity and price for the materials or services ordered, purpose of expenditure, approximate date of delivery, and signature of the person requesting the purchase.

- The purchase order is forwarded to the bookkeeper for review and presented to the pastor (or designated person) for signature of approval. Consideration should be given to:
 - necessity for the purchase
 - quantity reasonableness
 - reasonableness of price quotes
 - possible need to obtain price quotes
 - budget status
 - bidding process
2. If the parish requires the submission of purchase orders, the person(s) responsible for receiving materials or services should verify the accuracy of the delivery and forward the packing slips to the parish bookkeeper.
 3. Invoices should be date stamped when the mail is opened. An authorized Check Request Form should be attached to the invoice and both should be given to the bookkeeper within three days of receiving the invoice. The Check Request Form must identify the:
 - amount to be paid
 - payee and address
 - date check needs to be paid (note any discount)
 - ledger account name/number to be debited
 - signature of person requesting payment
 - signature of person authorizing payment

In the absence of a check request form, an ink stamp may be purchased and used, detailing the above information. The invoice should be stamped and information should be completed by the purchaser, approved and then forwarded to the bookkeeper.

4. The bookkeeper should match the check request/purchase order and the invoice to the packing slips, if applicable. Any discrepancy should be resolved with the person who signed the check request form.
5. In order to prevent duplicate payments the bookkeeper should note the following on each check request -- date of payment, check number, and initials of person preparing check and/or attach a copy of the check.

NOTE: Check request forms should also be used to request reimbursement of imprest accounts and petty cash accounts. It should include the same information as above, including all receipts or cancelled checks to verify expenditures.

Voided Checks

Voided checks should NOT be destroyed. All voided checks should be clearly marked "VOID" and filed in numerical order with the cancelled checks.

NON-SUFFICIENT CHECKS

When completing the Claim and Reimbursement Form, you must show the amount from the bank statement in bank deposits. If the check is paid in the next month, you will show it as a deposit but it will show in Section 3 as other income.

To record NSF check, the bookkeeper will credit cash and debit miscellaneous expense. When the check is redeposited, the bookkeeper will debit cash and credit other income which will include the original check and the redeposit.

PAYROLL ISSUES

The Internal Revenue Service specifies certain reporting and income tax withholding requirements on compensation paid to any individual.

Timesheets

All cafeteria employees must submit timesheets prior to each pay period. These timesheets should include:

- Employee's name
- Hours worked during pay period, including time off for vacation, sick days, holidays, personal time, etc.
- Employee's signature
- Supervisor's signature

Hourly workers must indicate actual hours worked during the pay period. A code should be used to indicate time off for all employees, such as:

V = Vacation Day
S = Sick Day
P = Personal Day
L = Unpaid Leave
O = Other, explain on timesheet

All cafeteria workers must be paid through payroll. This includes subs or other temporary workers.

PETTY CASH

A designated individual must be appointed custodian of the funds. This individual must ensure that the funds are kept secure, preferably locked in a safe. The fund should be no more than \$100 to be determined by the size of the program. No money should be taken from the fund without a voucher/receipt. The voucher/receipt should indicate the purpose of the expenditure and must be signed by the recipient. When the fund gets low, a check request with receipts attached should be completed and submitted for a check to be issued to replace the funds that have been spent.

All Petty Cash Funds should be listed on the parish balance sheet.

VENDOR BID PROCEDURES

The Central Food Service Office has established guidelines for purchasing from the Coop (Kentucky Educational Development Corporation) or approved vendors. A manager may only purchase approved items and specifications set from the coop or approved vendors. If other items are requested, a manager must contact the Central Office for approval. These guidelines have been established in correspondence with the Centralized Menu to control costs. Once a decision has been made to add an item, the Central Food Service Office will contact the distributor.

VOLUNTEERS

Individuals who volunteer to work in the cafeteria cannot be paid. They may receive a free meal.

If payments are made, the recipients must obtain and complete a W-2 form and have it on file with the school/parish office

OPERATIONS

CONSOLIDATED INVENTORY SCHEDULE (7-D)

1. Fill in school name and month.
2. Determine how inventory items should be best organized for your use (alphabetical, food groups, etc).
3. **Food Item** - Complete Food Item column listing all items in order determined in direction #2. Duplicate forms for future use and add new items as needed.
4. **Beginning Inventory**- Previous months ending Physical Inventory.
 - **Units** - Enter Total Units at the beginning of the month. This is last month's Physical Inventory (10a).
 - **\$ (Value)** - Enter Total Dollar Value at the beginning of the month. This is last month's Physical Inventory Value (10b).
 - **Average** - Enter Total Average Value at the beginning of the month. This is last month's Book Inventory Average (9c).
 - **Receipts during Month** - Any delivery are received throughout the month. Information should be verified with invoices.
 - **Units** - Enter number of units received (e.g., a case of Green Beans equals 6 units).
 - **\$** - Enter Total Dollar Value of item; **for Commodities received, the value is shipping cost** (e.g., 6 units of purchased Green Beans times \$1.87 totals \$11.22 or 6 units of commodity Green Beans times \$0.40 totals \$2.40).
5. **Ending Inventory Before Release** – Balance before relieving inventories for products used.
 - Units - Add all Unit Receipts (5a) to Beginning Inventory (4a).
 $4a+5a=6a$
 - \$ - Add all Receipt Dollar Values (5b) to Beginning Inventory (4b). $4b+5b=6b$
 - Average - Units divided by Value.
 $6b/6a=6c$
6. **Products Used** - Inventory used throughout the month. Units - Transfer total Units Used from Inventory Used Schedule 6-D.
 - \$ - Multiply Number of Units by Ending Inventory Average (6c).
 $7a \times 6c = 7b$
- 7) **Inventory Adjustment** - Any food transfers, food losses, and returns.
 - Units - Enter number of units transferred, lost, etc.
 - \$ - Enter dollar value of inventory transferred to another program, lost, etc. by multiplying Average of Ending Inventory Before Release (6c) by number of Inventory Adjustment Units (8a). $6c \times 8a = 8b$

- 8) **Book Ending Inventory** – Inventory before adjustments to Physical Inventory.
 Units - Ending Inventory Units minus Products Used Units minus any Units Transferred in or out.
 $6a-7a+/-8a=9a$
 \$ - Dollar Value of Ending Inventory minus Products Used Value minus value of Units Transferred in or out. Units transferred in should be recorded as receipts with the value of \$0.00.
 $6b-7b+/-8b=9b$
 Average - Units divided by Dollar Value.
 $9b/9a=9c$
- 9) **Physical Inventory** - Actual items on hand at month end.
 Units - Enter actual number of Units on hand at month end.
 \$ - Multiply Number of Units by Ending Inventory Average cost per Unit.
 $10a \times 9c = 10b$
- 10) **Inventory Over/Short** - Book Inventory minus Physical Inventory.
 Units - Difference in Book Inventory Units and Physical Inventory Units.
 $9a-10a=11a$
 \$ - Difference in Book Inventory Value and Physical Inventory Value.
 $9b-10b=11b$
- 11) **Total** all columns to verify inventory spreadsheet is in balance.
 -To verify **Physical Inventory Units** $4a+5a=6a-7a+/-8a=10a$
 -To verify **Physical Inventory Value**, $4b+5b=6b-7b+/-8b=10b$

EQUIPMENT DEPRECIATION SCHEDULE

This form will contain a list of all school food service equipment and its depreciable values.
To complete this form:

DESCRIPTION

- 1) A - Enter name of equipment.
- 2) B - Enter serial number, size or capacity of equipment.
- 3) C - Enter energy source of equipment.

IN-SERVICE DATE

- 4) D - Enter month equipment was put in service.
- 5) E - Enter year equipment was put in service.

TYPE OF EQUIPMENT

- 6) F - Enter original purchase price or adjusted depreciable value of food service equipment.
- 7) G - Enter original purchase price or adjusted depreciable value of vehicles, computers, cash registers, etc. if purchased before January 1, 2002.
- 8) H - Enter original purchase price or adjusted depreciable value of vehicles, computers, cash registers, etc. if purchased after January 1, 2002.

PRE-ESTABLISHED LIFE TERMINATION DATE

- 9) I & J - Enter month/year of pre-established life termination date. All food service equipment has a 12-year depreciation cycle. If purchased before January 1, 2002, all vehicles, computers, cash registers, typewriters, etc. have a 4-year depreciation cycle and the 0.0208 depreciation factor must be used. If purchased after January 1, 2002, all vehicles, computers, cash registers, typewriters, etc. have a 5-year depreciation cycle and the 0.0166 depreciation factor must be used.

DELETIONS FROM SCHEDULE

- 10) K & L & M - Check reason food service equipment is deleted from schedule.
- 11) N & O - Enter month/year that equipment was deleted from schedule.

Multiply the totals of columns F & G by the appropriate depreciation factor to establish the depreciable value for each category. The total after calculation for columns F & G is the monthly depreciation.

This form is a perpetual record of equipment bought with food service funds, and should be updated out each month for record keeping purposes.

FOOD LOSS RECORD INSTRUCTIONS

PURPOSE: This form is to be used to record all food losses.

1. Enter date the loss was discovered.
2. Enter name of the product lost.
3. Enter quantity of food lost – record in units.
4. Enter value of food lost.
5. Explain circumstances surrounding loss.
6. Adjust Inventory.

Copy submitted to Food Service Office. Copy maintained in the Inventory file.

JOURNAL ENTRIES

Journal Entry 1 - To book goods/services received during the month but not yet paid.

Debit appropriate expense account for goods/services received this month but not yet paid. Attach copies of invoices as support. The monthly administration fee will always be included, as it is not deducted from your reimbursement in the same month the fee is due. Credit account number 0611.7X Accounts Payable/Cafeteria for the total of all unpaid bills. When the unpaid bills are paid they will be debited to 0611.7X.

Journal Entry 2 - To book amounts earned but not yet received during the month.

Credit appropriate income account for income earned but not received. This will always include the current month reimbursement due. Debit account number 0152.7X Accounts Receivable/Cafeteria for the total of all income due. When income is received it will be credited to 0152.7X.

Journal Entry 3 - To book depreciation expense for the month.

Debit depreciation expense for the month from the Equipment Depreciation Schedule. Credit Accumulated Depreciation for the same amount.

Journal Entry 4 - To relieve inventory for cost of food used during the month.

Debit Cost of Food Used for the value of Products Used from the Consolidated Inventory Schedule 7-D and credit Cafeteria Food Inventory for the same amount.

Journal Entry 5 - To book adjustments for transfers out, losses, etc. during the month.

Debit Inventory Adjustment and credit Cafeteria Food Inventory for food transferred out or food losses.

Journal Entry 6 - To book adjustments to balance book to physical inventory for the month.

Refer to the over/short column on the Consolidated Inventory Schedule 7-D.

If inventory value is over (inventory increase), debit Cafeteria Food Inventory and credit Inventory Adjustment.

If the inventory value is short (inventory decrease) credit Cafeteria Food Inventory and debit Inventory Adjustment.

Journal Entry 7- To book payroll not yet paid for the month.

Debit appropriate payroll expenses from the payroll summary sheet. Credit account number 0611.7X Accounts Payable/Cafeteria for the total of all payroll expenses.

MONTHLY FILES

All records pertaining to a specific reporting month must be maintained in a separate monthly file folder. Each monthly file should contain a copy of the D2 Report and Claim for Reimbursement, accompanied by all source documents:

- Deposits
- Checks written (invoices & check requests)
- Time sheets/payroll register
- Bank statement
- Bank reconciliation
- D-2 and all supporting documentation
- Daily planning & production records
- Inventory forms
- Equipment Depreciation Schedule
- Exterminator records
- Health Inspection records
- Summary of activities which encourage children & parental involvement
- Master free/reduced roster updated monthly listing students for free or reduced lunch
- All USDA commodities documentation related to receipt of commodities
- Temperature Charts
- Emergency Roster

PLANNING AND PRODUCTION RECORDS

- 1) Fill in the school name, serving date, lunch or breakfast (check one).
- 2) Use the daily menu from the monthly menu plan to complete the **MENU** section.
- 3) In the appropriate sections, from the daily menu list **Food Items** that will be used.
- 4) Determine yield for each item from the Food Buyer's Guide/CN.
- 5) In the **Planning** section, under portion size, enter the size of the portions to be served (e.g., use 4oz, 3oz, 2oz for meats, and $\frac{1}{2}$ cup, $\frac{3}{4}$ cup for fruits and veggies). Under portions needed, record how many portions will be needed to serve all students.
- 6) After meal is served, complete **Actual** section from inventory sheets. Indicate units of food used (e.g., 2#10 cans).
- 7) Enter amount not served.
- 8) Enter average Cost Per Unit from last month's Consolidated Inventory Schedule 7-D
- 9) Enter the total food cost = Multiply Units Used by Cost Per Unit. (#6 X #8).
- 10) Disposition of Amount Not Served. Explain how the food from the Amounts not used column will be disposed (e.g., reheat the rest as leftovers with tomorrow's lunch).
- 11) Cost per meal served:
 - A. Total Food Cost - total of all sections of total food cost.
 - B. Meals Served - from 2-DL column D (total served) + column F (adult/other).
 - C. Cost Per Meal - Total Food Cost divided by the Total Meals Served.

NOTE: Units used on production records should match to units used on inventory sheets.

RECORD RETENTION

All programs must maintain records for three years plus the current year.

Copies of paid invoices for equipment and smallwares should be maintained in a perpetual file to ensure accurate record keeping for National School Lunch Program property.

SERVING LINE PROCEDURES

The student must be offered a minimum of the five components required for a school lunch; he/she shall choose three, four or all five of the components that constitute a meal. No student is required to take any one of the five meals components offered.

The student must be offered a minimum of the four components required for a school breakfast; he/she shall choose three or four components that constitute a meal. No student is to be required to take any one of the four meal components offered.

The student is expected to take responsibility for making and expressing his/her food choices or selections. Opportunities for self-service are to be incorporated into the serving procedure whenever possible.

SOURCE DOCUMENTS – “D – PACKET”

The “D-packet” is a financial management system designed by the Kentucky Department of Education, Division of School and Community Nutrition Services and edited by the local Food Service Division of the Chancery for use in the Archdiocese school lunch/breakfast programs. The forms are designed to aid parish program personnel in gathering and summarizing data to report on the monthly D2 Report and Claim for Reimbursement. Keeping this information is a requirement. Use of forms other than those indicated is not recommended. For purposes of identification, the D-Packet includes:

- D-2 Report and Claim for Reimbursement
- D-3A Daily Count (Breakfast & Lunch)
- D-4A Daily Sales Form (Lunch & Breakfast)
- D-13 Edit Check Worksheet
- Inventory Schedule 7-D – Consolidated Inventory
- Schedule 6-D – Products Used
- Schedule 5-M Allocation of Production Cost
- Bank Reconciliation
- Bank Statement
- Balance Sheet
- Income Statement
- General Ledger
- Check register
- Payroll register

SPECIAL DIETARY NEEDS

The school food service, like the other programs in the school, is responsible for ensuring that its benefits (meals) are made available to all children with disabilities.

School Food Service Responsibilities

- School food service staff must make food substitutions or modifications for students with disabilities.
- Substitutions or modifications for children with disabilities must be based on a prescription written by a licensed physician.
- The school food service staff is encouraged, but not required, to provide food substitutions or modifications for children without disabilities with medically certified special dietary needs who are unable to eat regular meals as prepared.
- Substitutions for children without disabilities, with medically certified special dietary needs must be based on a statement by a recognized medical authority.
- Under no circumstances are school food service staff to revise or change a diet prescription or medical order.
- It is important that all recommendations for accommodations or changes to existing diet orders be documented in writing to protect the school and minimize misunderstandings. Schools should retain copies of special, non-meal pattern diets on file for reviews.
- The diet orders do not need to be renewed on a yearly basis; however the schools are encouraged to ensure that the diet orders reflect the current dietary needs of the child.
- Note and date any changes in the child's medical condition or diet order.

TRANSFER OF PRODUCTS INSTRUCTIONS

PURPOSE: The Transfer of Commodities Form is to be used to transfer products between Archdiocese of Louisville programs.

1. Enter name of the Program transferring the product.
2. Enter name of the Program receiving the product.
3. Enter name of the product being transferred.
4. Enter number of units being transferred for each item.
5. Enter the dollar value being transferred for each item.
6. Person making the transfer must sign verifying transfer was made and amount transferred. Enter date the transfer was made.
7. Person receiving the transfer must sign verifying transfer was made and amount transferred. Enter date the transfer was made.
8. When transfer is complete, both programs must enter information on Consolidated Inventory Schedule 7-D as an Inventory Adjustment. Transferring program will adjust (reduce) inventory by value. Receiving program will receive the goods at "0" cost. If using the disk to calculate inventory, Receiving Program should record product as a receipt with a value of "0".

Form Distribution: Transferring program is responsible for submitting copy to Central Food Service Office.

PERSONNEL

ACCOUNTABILITY

The Food Service Manager is financially accountable to the principal and pastor or other designated parish administrator. The designated parish administrator must be responsible for monitoring the financial records of the school lunch/breakfast program(s) on a regular basis. The program manager/bookkeeper will make all records and reports available to the parish audit committee for annual review.

The Food Service Office at the Chancery will conduct a yearly on-site review of the program and financial operations.

All such programs are subject, at any time, to audit or review by the Division of School and Community Nutrition Services, Kentucky Department of Education, Division of Food Distribution Services or representative of the USDA.

FRAUD STATEMENT

“Whoever embezzles, willfully misapplies, steals or obtains by fraud any funds, assets or property provided under the National School Lunch Program and/or School Breakfast Program whether received directly or indirectly, shall if such funds, assets or property are of a value of \$100 or more, be fined not more than \$25,000 or imprisoned not more than 5 years or both; or if such funds, assets or property are of a value of less than \$100, be fined not more than \$1,000 or imprisoned not more than 1 year or both. Whoever receives, conceals or retains for his use or gain, funds, assets or property provided under the National School Lunch Program and School Breakfast Program, whether received directly or indirectly, knowing such funds, assets or property have been embezzled, willfully misapplied, stolen or obtained by fraud, shall be subject to the same penalties.” This statement regarding fraud is from the National School Lunch Program Regulation 7 CFR 245.12, January 1, 1996.

CERTIFICATION

Sanitation Certification by the Louisville and Jefferson County Health Department

A Jefferson County Fiscal Court ordinance requires that a certified foodservice manager and/or foodservice employee is required to be on duty whenever the foodservice establishment is open for business or preparing food. All foodservice establishments are required to post the certificates issued by the Board of Health.

The Archdiocese of Louisville requires that ALL foodservice employees be health department certified.

The process for becoming certified is as follows:

1. \$25.00 check or money order payable to: Louisville Metro Government.
2. Application filled out by employee enrolling in the course.
3. Home Study Booklet mailed to enrollee.
4. Contact Martha Gregory & Associates, Inc. to sign up for the course.
Phone: (502) 458-0841.
Training center location: 3010 Taylor Springs Drive, Louisville, KY 40220
5. Three hour Sanitation Course, with up to one hour for the test. Each applicant has 90 days from date of enrollment to complete the course and examination with Martha Gregory & Associates, Inc. Failure to provide 24 hours advance notification of cancellation will result in the applicant losing their \$25.00 fee.
6. Retest fee is \$13.00, if you don't pass written test.
7. Certification remains current for 3 years.
8. ServSafe, the Experior Assessments and the National Registry of Certified Food Professionals certificates will be accepted in lieu of the Food Service Managers course, for a fee of \$25.00. Please submit original certificate, social security number and picture I.D. along with the application for transfer.
9. Duplicate copies - \$10.00.

EVALUATION –PROGRAM

Evaluation through a formative review process is important for the professional and personal growth of the individual employee as well as the continuous improvement to the food service program. Due to the specialized nature of a federally subsidized food service operation within the school setting, there are several valid sources from which constructive feedback may be obtained.

Local Level Review Process – to be conducted by local school administrator.

Employee Performance Review – An annual process to be conducted by the principal with the manager and by the manager with each assistant. The process includes completion of the review form, followed by a conference and goal-setting session with the employee. A copy of each review is to be maintained in the school lunch program file. In addition, a copy of the manager's review should be sent to the Food Service Office. All reviews are to be completed by April 15.

Food Service Office Review Process – to be conducted by the Archdiocesan Food Service Director or his/her Assistant.

School Visit – An annual on-site review and report of program status and performance; assessment of program compliance to federal standards of the National School Lunch/Breakfast and Food Distribution Programs. This review is to be completed each year, by the required date of February 1. A copy of the report summary will be mailed to the food service manager and copied to the principal.

State Technical Assistance Review – to be conducted by a state field consultant assigned to the region.

Kentucky Department of Education Program Review – scheduled by consultant to provide assistance and instruction regarding general program operations.

Kentucky Department of Agriculture Program Review – scheduled by consultant to provide assistance and instruction regarding the proper storage procedures.

Formal Audit of School Food Service Program – to be conducted by a private accounting firm retained by the Food Service Office; reviews programs compliance with federal standards for full cost accounting.

Federal/State Formal Program Reviews – scheduled and conducted by teams of federal/state auditors; reviews total program compliance to federal standards of operation.

JOB DESCRIPTIONS

CAFETERIA MANAGER: Responsible for providing healthy and nutritious meals to students at the lowest possible cost and greatest level of efficiency and in compliance with policies and procedures outlines in this handbook.

A. Requirements:

- Dependable, at least 18 years of age, able to relate to children of all ages, work in a team environment, delegate responsibility, have good organizational and communication skills, trustworthy.
- Health Department Certification.
- Have or working towards School Nutrition Association certification.
- Certification is to be obtained at Level 1 in two years and at Level 2 in five years.
- Upon completion of certification, it is required that it be maintained.

B. Responsibilities:

- Train, organize, and supervise all employee work assignments for meal production, kitchen, cleaning, maintenance schedules, and bookkeeping tasks.
- Assist the principal in hiring food service employees.
- Assure that sanitation standards are met in food preparation, use and care of equipment and personal habits.
- Prepare and serve food, and assist with kitchen cleaning as required.
- Purchase food and supplies.
- Ensure compliance with United States Department of Agriculture, National School Lunch/Breakfast Program, and Archdiocese of Louisville Financial Policy and Procedure.
- Maintain all files necessary to complete and submit the monthly D-2 Report and Claim for Reimbursement to the Central Food Service Office by the 10th of the following month.
- Maintain a file of all production and financial records for the current year and three prior years.
- Reconcile daily count and cash after breakfast/lunch service.
- Maintain all storage areas by recording daily temperatures for refrigerators, and freezers, and weekly temperatures for dry storage areas.
- Prepare budget.
- All managers are expected to attend bi – monthly manager meetings, or have a representative attend, as well as training sessions, workshops and State Conference. National Conference if eligible.

- Special projects as required.

ASSISTANT MANAGER/COOK: Responsible for assisting the manager in providing healthy and nutritious meals to students at the lowest cost and greatest level of efficiency.

A. Requirements:

- Dependable, at least 18 years of age, able to relate to children of all ages, work in a team environment, have good organizational skills, trustworthy.
- Health Department certification.

B. Responsibilities:

- Assist manager in performing daily administrative duties.
- Assure that sanitation standards are met in food preparation, use and care of equipment and personal habits.
- Prepare and serve food, and assist with kitchen cleaning as required.
- Assist manager in planning and coordinating parent/student involvement activities.
- Ensure compliance with USDA, National School Lunch Program and Archdiocese of Louisville Financial Policies and Procedures.
- Assist manager in maintaining all files necessary to complete and submit the monthly D2 Report and Claim for Reimbursement.
- Attend training sessions, meetings, and workshops planned for and required of all assistant cafeteria managers. Attend bi monthly Cafeteria Manager Meeting for manager if necessary.
- Special projects as required.

OTHER FOOD SERVICE EMPLOYEES: Responsible for assisting the manager, assistant manager and cook in the preparation of school lunch and the cleaning of the kitchen.

REQUIREMENTS:

- At least 18 years of age.
- Health Department Certified.
- Dependable, able to relate to children of all ages.
- Work well in a team environment, trustworthy, have good communication skills.

RESPONSIBILITIES:

- Assure that sanitation standards are met in food preparation, use and care of equipment and personal habits.
- Assist with the preparation and serving of food.
- Assist with kitchen cleaning duties as required.
- Perform other tasks as assigned by manager.
- Special projects as required.
- Check with manager daily for other tasks before signing out.

PERSONNEL POLICIES

Separate publications have been issued regarding the following policies:

- Personnel Policies and Procedure Manual
- Safe Environment Training
- Position Descriptions and Salary Ranges

Each school should have copies of these documents on file.

POLICY

A LA CARTE SALES

A school Lunch/Breakfast Program, in grades K-8, may sell second portions of menu items or other nutritious non-menu items **only to students who purchase a meal**. Selling A la carte items to students who have not first purchased a meal undermines the financial stability of the program in that a major portion of the program support is derived from federal reimbursement received only for meals served rather than for individual A la carte items sold. **Therefore, no student may purchase any extra or A la carte item other than milk, juice or water unless he/she has first purchased a school lunch/breakfast.**

All soft drink machines **must be** turned off 30 minutes **before** lunch is served and cannot be turned on until 30 minutes **after** lunch is finished.

A la carte items must be priced to adequately cover cost for purchase, storage, preparation and service. All proceeds from A la carte **must be deposited in the program account daily** under miscellaneous A la carte sales.

Selling of foods with a minimal nutritional value is prohibited. The four food categories of minimal nutritional value are soda water, water ices, chewing gum, and candies. All a la carte items sold must have approval from the Central Food Service Office.

POINT OF SALE SYSTEM

A la carte sales are recorded on the individual a la carte item key. A la carte sales reports include the names and quantities of items sold during the current day's sales periods. Also included are the quantities of individual a la carte items sold-to-date.

The amount of money deducted from a student's account to purchase A la carte is included in ACCOUNT DEBIT TOTAL AMOUNT.

ADULT MEALS

The pricing of adult meals should account as total income and not be dependent on reimbursement from the government. The Kentucky Department of Education suggests pricing adult meals as followed:

ADULT MEALS – PRICING

Pricing Adult Meals: The charge for adult meals shall, at a minimum, total the highest charge to students in the paid category plus the paid rate of reimbursement, plus the state matching funds, plus commodity assistance.

Example: Lunch price (\$1.85) + Reimbursement Rate (\$0.20) + State Matching Fund (\$0.04) + Commodity Assistance (\$0.1550) = the adult should be charged no less than \$2.25.

ADULT MEALS- ELIGIBILITY FOR FREE MEALS

Program adults: Program adults may receive meals at no cost. “Program adults” are those individuals who are assigned to work full-time in the food service operation and whose salaries are paid **entirely** from food service funds. Part-time employees and substitute employees assigned to work in the food service program whose salaries are paid **entirely** from food service funds may also receive a meal at no cost. The food service office has the option to decline any adults requesting to eat at no cost.

ADULT MEALS – PORTION SIZE

Portion sizes for adult meals are to be in the same quantities as those specified for middle and high school students. Second portions for adults may be made available and priced as A la carte items.

In no instance may any adult meal ever be claimed for reimbursement under the School Breakfast Program or National School Lunch Program.

COLLECTION PROCEDURE

Collection and identification of the reimbursable meal must take place at the end of the serving line. The cashier is to have an updated master list of eligible students available for reference at all times. Each cashier must be knowledgeable and skilled in recognizing student selections that may be counted and claimed as reimbursement.

POINT OF SALE SYSTEM

Students are issued personal identification numbers (PIN) that reference their accounts in the terminal database. Entering the PIN into the terminal accesses the account to be used for processing transactions and performing other functions requiring account access.

Students can deposit money into their accounts, which are then debited when the account holder makes a purchase. Maintaining accounts eliminates the need to carry cash on a daily basis and provides flexibility in processing POS transactions. Students may pay in advance or pay cash at the terminal.

COMPETITIVE FOODS

Competitive foods, as defined by The United States Department of Agriculture Food and Nutrition Services, are any foods sold in competition with the program to children in food service areas during lunch periods.

No food or beverage may be sold or served to students in the cafeteria in competition with the National School Lunch/Breakfast Program until one-half hour after the end of the last lunch period. **If a violation occurs and federal reimbursement is lost for the day, the school must write a check for the amount of reimbursement lost and deposit into the cafeteria's checking account.**

No student may be permitted to have a carbonated beverage in the cafeteria during the meal periods.

Meals from commercial providers or "fast food" restaurants are not to be permitted in the cafeteria during the meal periods at any time.

Every effort should be made to inform the manager in advance of upcoming field trips or other class plans, which will result in student absences from lunch. Prior notification of such plans allows the manager to adjust menus, purchasing and staffing needs.

Supervised field trips meals are counted as reimbursable lunches if prepared by school food service department; it is highly encouraged to have lunches prepared by the school cafeteria. These meals must be subject to stringent sanitary and precautionary measures to prevent food contamination and spoilage.

FOOD SERVICE PROGRAM PROPERTY

A list must be maintained of all equipment purchased by the school lunch/breakfast program. A physical inventory should be taken annually to insure the continued accuracy of the list. All smallwares and equipment must be noted on the individual inventory schedules and signed by the manager and principal. This form is due to the Food Service Office by August 31st each year and each time it is updated within the school year. Copies of paid invoices for the equipment and supplies should be maintained in the program files. Equipment requiring an amount of \$1,000 or more by the program must be listed on the Depreciation Schedule submitted annually to the Food Service Office by August 31st of each year.

Any equipment purchased over \$1,000 by the National School Lunch Program must obtain three quotes on the exact item, complete the Request for Purchase or Lease of Equipment and submit to the Central Office for approval. Maintain copies of written quotes in the program files.

All equipment and non-perishable supplies purchased by the school lunch/breakfast program must be safeguarded from theft or damage. Because the kitchen and cafeteria are frequently used for parish/school functions outside of the school food service program(s), it is strongly recommended that the parish/school utilize guidelines and a written agreement for the safe and proper use of the equipment and the facility.

If a National School Lunch/Breakfast Program closes, all money, inventory and equipment purchased with food service monies must stay within the National School Lunch Program funds.

EQUIPMENT DEPRECIATION

All equipment purchased by the school lunch/breakfast program for an amount over \$1000 must be listed on the annual Depreciation Schedule. All such equipment must be depreciated and reflected in the total depreciation cost claimed monthly on the D2 Report and Claim Form for Reimbursement, Section IV. In the event that the total cost of a piece of equipment is shared by the parish and program, only the cost shared by the program (if it exceeds \$1000) is to be reported on the annual Depreciation Schedule.

FOOD STORAGE PRACTICES

CARE & STORAGE PRACTICES

All programs should follow good care and storage practices for all foods received. Foods must be stored in an area that safeguards against the theft, spoilage or loss of such foods. The parish/school is to provide a storage area that can be secured and to which there is minimal and limited access. Kentucky Department of Agriculture recommends the following procedures:

- Foods should be stored only in refrigerators and freezers that are operating properly and in good repair.
- Refrigerators and freezers should be thoroughly cleaned and dried before storing foods.
- Where walk-in refrigerators and freezers are used, foods should not be placed directly on the floor. Foods should be placed on pallets or on shelves, no closer than two inches between the walls and the food containers to ensure proper air circulation.
- Temperatures in the refrigerators and freezers must be taken and recorded daily.
- Thermometers and other refrigeration equipment should be checked periodically to ensure that they are operating properly. It is desirable that this be done at least twice each week. Malfunctioning equipment should be repaired immediately.
- Refrigerators and freezers should be equipped with an alarm system for easy detection of high temperatures and power failures. Refrigerators and freezers should be checked immediately after a power failure to make sure they are operating properly and that stored foods are still in good condition.
- All refrigerators and freezers should be locked during summer months. The key should be left with the individual in charge of the school. Only authorized personnel should be allowed to check the refrigerators and freezers and take the temperatures.
- An effective insect/rodent control program should be maintained in all schools that store foods.

STORING AND STACKING

Foods must be stored at least 6 inches off the ground on pallets and no closer than two inches from the ceiling. These spaces promote good air circulation and easy access to cleaning. Unopened cases may be stored but once the case is opened cardboard boxes must be discarded. Large bags of rice, flour and cornmeal should be stored in food storage containers that are movable.

INVENTORY

A physical inventory **must be taken** at the end of the month to determine the accurate amount of food on hand. The physical inventory should be compared with the book inventory and any differences reconciled, documented, and the balance carried forward.

PRACTICING FIFO

FIFO, First In - First Out, the first goods purchased or produced should be the first goods used.

REFRIGERATED & FREEZER FOOD STORAGE

Temperatures must be checked on a **daily** basis with a reliable, rust resistant, non-breakable thermometer that is located in the warmest area. The date, temperature and person responsible must be noted on the Temperature Recording Chart.

Proper circulation is also important; the Kentucky Department of Agriculture suggests the following guidelines:

- Do not overload shelves
- Do not jam or pack foods together
- Allow at least a two inches of space between the food and the walls of the refrigerator
- For walk-ins, do not store food directly on the floor.

The temperatures should be maintained at the following temperatures:

- Refrigerated/Cooler 35-45 degrees F
- Freezer 0 degrees F or below

DRY STORAGE

Dry storage provides storage for semi-perishable foods. Without proper ventilation, the stockroom may become too hot and humid which can decrease the shelf life of canned goods.

The temperatures should be maintained at **70 degrees F** or below and monitored **weekly**.

DISPOSING OF OUT OF CONDITION FOOD

To dispose of out of condition food; open the product, empty product into dumpster and pour bleach over the product, complete food loss form and forward to the Central Office.

FOOD RECALL PROCEDURE

The Central Office will contact each school when a food recall occurs. The program is to place an immediate hold on all items related to the recall until advice is received on proper disposition. A brief explanation of the suspected nature or cause must be noted with the item. Once the process is complete, the program must follow instructions from the Central Office whether to use or dispose of the item.

PEST CONTROL

A licensed professional exterminator must perform a monthly extermination treatment with an excellent reputation for a safe application of chemicals.

GRIEVANCE POLICY

In accordance with FNS Instruction 113.6, the Archdiocese of Louisville provides a grievance procedure in the event a person believes he/she or their child has been discriminated against and/or denied service on the basis of race, color, national origin, sex, age or disability in the food service program provided by the Archdiocese of Louisville.

GENERAL INSTRUCTIONS

All complaints, written or verbal, alleging discrimination on the basis of race, color, national origin, sex, age or disability shall be processed within ninety (90) days of receipt in the manner prescribed in this instruction.

Procedure for Filing Complaints of Discrimination

1. Right to File a Complaint

Any person alleging discrimination based on race, color, national origin, sex, age or disability has a right to file a complaint within 180 days of the alleged discriminatory action. Under special circumstances this time limit may be extended.

2. Acceptance

All complaints, written or verbal, shall be accepted by the Division of School and Community Nutrition and forwarded to the SERO-USDA. It is necessary that the information be sufficient to determine the identity of the agency or individual toward which the complaint is directed, and to indicate the possibility of a violation. Anonymous complaints shall be handled as any other complaint.

3. Verbal Complaints

In the event that a complaint makes the allegation verbally or through a telephone conversation and refuses or is not inclined to place such allegations in writing, the person to whom the allegations are made shall write up the elements of the complainant. Every effort shall be made to have the complainant provide the following information:

- a) Name, address, telephone number, or means of contacting the complainant.
- b) The specific location and name of the entity delivering the program, service, or benefit.
- c) The nature of the incident(s) or action(s) that led the complainant to believe discrimination was a factor.
- d) The basis on which the complainant feels discrimination exists (race, color, national origin, sex, age, disability).
- e) The names, titles and addresses of the persons who may have knowledge of the discriminatory action(s).
- f) The date(s) during which the alleged discriminatory action occurred, or if continuing, the duration of such actions.

MENUS

Menus will be planned by the **Central Food Service Office** keeping in mind student preference, nutritional quality, cost, commodity usage, variety, and market availability.

Menus are planned on a **4-week rotating schedule and communicated to the managers** to be forwarded to the parents and students in advance of service.

Menus are subject to change only when unforeseen or unusual circumstances warrant such change.

The lunch must be planned to offer every student five items: a specific amount of meat or meat alternate, two or more vegetables and/or fruits, whole-grain or enriched bread or bread alternate and fluid milk as beverage.

PARENT STUDENT INVOLVEMENT

Opportunities for parent and student involvement in the School Lunch/Breakfast Program must be provided and documented on a regular basis.

It is the responsibility of the Food Service Manager to plan and implement such activities and events. Opportunities for parent involvement include parent lunches, volunteer opportunities, parent surveys, and sharing recipes.

Examples of student involvement and suggested activities:

- 1. Prepare articles and/or pictures for use in the local newspaper or student newsletter. Articles might feature menus, meal statistics, special activities, offer verses serve, or nutritional information.**
- 2. Invite parents, grandparents or other people in the community to have lunch at school.**
- 3. Plan projects to improve the appearance of the lunchroom. Use bulletin boards, special holiday or seasonal decorations and student artwork, etc.**
- 4. Conduct student surveys on food likes and dislikes and solicit menu suggestions.**
- 5. Discuss nutrition in the classroom. Plan to evaluate one week's cafeteria menus to determine if they meet the Dietary Guidelines for Americans. Evaluate the menus as to variety, texture, and color.**
- 6. Make available and encourage the use of nutritious snack foods.**
- 7. Take the kindergarten students on a tour of the kitchen.**
- 8. Meet with students and parents to discuss the importance of nutrition as it relates to personal appearance and health.**

All activities must be documented, noting date and nature of the activity or event and will be reviewed on the annual on-site visit.

APPENDIX

1. Check Request
2. Civil Rights Grievance
3. Deposit Form
4. Enhanced Food Based Menu Planning
5. Equipment Depreciation Schedule
6. Food Allergies
7. Food Loss Record
8. Information Sheet
9. Inventory
10. Journal Entries
11. Planning & Production
12. Products Used
13. Request to Purchase
14. Student / Parent Involvement
15. Temperature Recording Chart
 - Freezer
 - Cooler
 - Dry Storage
16. Time & Attendance
17. Transfer of Products

CAFETERIA CHECK REQUEST

Invoice Date: _____

AGENCY: _____

DATE OF REQUEST: _____

Accounting Dept. Use Only	
Date Due	_____
Vendor No.	_____
Exempt?	_____
Reviewed by:	_____
prepared by:	_____
Check No.	_____
Check Date:	_____

PAYABLE TO: _____

SSN OR EIN: _____

REMIT ADD: _____

CITY: _____ STATE: _____ ZIP _____

TOTAL AMOUNT

ACCOUNT NO.	INVOICE NO.	AMOUNT
0151.82	Inventory	
4215.82	Non-inventory	
4213.82	Supplies	
2328.82	Miscellaneous	

PURPOSE OF EXPENDITURE: _____

REQUESTED BY: _____ AGENCY APPROVAL: _____

KENTUCKY DEPARTMENT OF EDUCATION
Division of Nutrition and Health Services
Civil Rights Grievance Report Procedures

In accordance with FNS Instruction 113.6, the _____ Sponsor/Sponsoring Organization provides a grievance procedure in the event a person believes he/she or their enrolled participant has been discriminated against and/or denied service on the basis of race, color, national origin, sex, age or disability in the food service program provided by the _____ Sponsor / Sponsoring Organization.

GENERAL INSTRUCTIONS

All complaints, written or verbal, alleging discrimination on the basis of race, color, national origin, sex, age or disability shall be processed within ninety (90) days of receipt in the manner prescribed in this instruction.

Procedure for Filing Complaints of Discrimination

1. Right to File a Complaint

Any person alleging discrimination based on race, color, national origin, sex, age or disability has a right to file a complaint within 180 days of the alleged discriminatory action. Under special circumstances this time limit may be extended.

2. Acceptance

All complaints, written or verbal, shall be accepted by the Division of Nutrition and Health Services and forwarded to the SERO-USDA. It is necessary that the information be sufficient to determine the identity of the agency or individual toward which the complaint is directed, and to indicate the possibility of a violation. Anonymous complaints shall be handled as any other complaint.

3. Verbal Complaints

In the event that a complainant makes the allegation verbally or through a telephone conversation and refuses or is not inclined to place such allegations in writing, the person to whom the allegations are made shall write up the elements of the complainant for the complainant. Every effort shall be made to have the complainant provide the following information:

- a. Name, address, telephone number, or means of contacting the complainant.
- b. The specific location and name of the entity delivering the program, service, or benefit.
- c. The nature of the incident(s) or action(s) that led the complainant to believe discrimination was a factor.
- d. The basis on which the complainant feels discrimination exists (race, color, national origin, sex, age, disability)
- e. The names, titles and addresses of the persons who may have knowledge of the discriminatory action(s).
- f. The date(s) during which the alleged discriminatory action occurred, or if continuing, the duration of such actions.

Civil Rights Grievance Report Form

Name _____

Date _____

Address _____

Phone _____

If your grievance concerns a discriminatory action due to race, color, national origin, sex, age, or disability, please be very specific and give full details concerning the occurrence.

State the reason(s) you are filing this grievance report.

What response did you receive from the sponsor representative during the alleged occurrence?

What results are you seeking from this communication?

Signature of Complainant

Date

Civil Rights Grievance Report Form

Information on person filing grievance:

Name _____

Address _____

Telephone Number _____

Date Received by Sponsor _____

Director's Name _____

Date forwarded to KDE _____

RESOLUTION/COMMENTS:

Signature of Sponsor Representative

Date

CAFETERIA DEPOSIT FORM

Date _____

Account #	Account Description	Amount
1711.82	Daily Lunch Sales	
1712.82	Daily Breakfast Sales	
1713.82	Ala Carte/Adult & Other Lunches	
1714.82	USDA Reimbursement Lunch	
1715.82	USDA Reimbursement Breakfast	
1716.82	Other Income	
0141.82	Accounts Receivable	
TOTAL MUST AGREE WITH DEPOSIT TICKET		<u> </u>

ATTACH BANK VALIDATED DEPOSIT TICKET TO THIS FORM

Deposited by:	_____
Entered by:	_____
Date entered:	_____

The Enhanced Food-Based Menu Planning Approach

The Enhanced Food-Based Menu Planning Approach is a variation of the Traditional Menu Planning Approach. It is designed to increase calories from low-fat food sources in order to meet the Dietary Guidelines. The five food components are retained, but the component quantities for the weekly servings of vegetables and fruits and grains/breads are increased.

ENHANCED FOOD-BASED MENU PLANNING APPROACH-MEAL PATTERN FOR LUNCHESES					
FOOD COMPONENTS AND FOOD ITEMS	MINIMUM REQUIREMENTS				OPTION FOR
	AGES 1-2	PRESCHOOL	GRADES K-6	GRADES 7-12	GRADES K-3
Milk (as a beverage)	6 fluid ounces	6 fluid ounces	8 fluid ounces	8 fluid ounces	8 fluid ounces
Meat or Meat Alternate (quantity of the edible portion as served):					
Lean meat, poultry, or fish	1 ounce	1½ ounces	2 ounces	2 ounces	1½ ounces
Alternate protein products ¹	1 ounce	1½ ounces	2 ounces	2 ounces	1½ ounces
Cheese	1 ounce	1½ ounces	2 ounces	2 ounces	1½ ounces
Large egg	½	¾	1	1	¾
Cooked dry beans or peas	¼ cup	3/8 cup	½ cup	½ cup	3/8 cup
Peanut butter or other nut or seed butters	2 tablespoons	3 tablespoons	4 tablespoons	4 tablespoons	3 tablespoons
Yogurt, plain or flavored, unsweetened or sweetened	4 ounces or ½ cup	6 ounces or ¾ cup	8 ounces or 1 cup	8 ounces or 1 cup	6 ounces or ¾ cup
The following may be used to meet no more than 50% of the requirement and must be used in combination with any of the above: Peanuts, soynuts, tree nuts, or seeds, as listed in program guidance, or an equivalent quantity of any combination of the above meat/meat alternate (1 ounce of nuts/seeds equals 1 ounce of cooked lean meat, poultry or fish).	½ ounce =50%	¾ ounce =50%	1 ounce =50%	1 ounce =50%	¾ ounce =50%
Vegetable or Fruit: 2 or more servings of vegetables, fruits or both	½ cup	½ cup	¾ cup plus an extra ½ cup over a week ²	1 cup	¾ cup
Grains/Breads(servings per week): Must be enriched or whole grain. A serving is a slice of bread or an equivalent serving of biscuits, rolls, etc., or ½ cup of cooked rice, macaroni, noodles, other pasta products or cereal grains	5 servings per week ² – minimum of ½ serving per day	8 servings per week ² – minimum of 1 serving per day	12 servings per week ² – minimum of 1 serving per day ³	15 servings per week ² – minimum of 1 serving per day ³	10 servings per week ² – minimum of 1 serving per day ³

¹ Must meet the requirements in appendix A of 7 CFR 210.

² For the purposes of this table, a week equals five days.

³ Up to one grains/breads serving per day may be a dessert.

The Enhanced Food Based Menu Planning Approach is designed to meet the nutritional standards set forth in program regulations.

FOOD ALLERGY

WHAT WE NEED TO KNOW

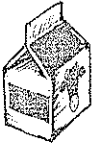
Customers allergic to some foods need our special attention. Understanding the food allergy basics on this chart will help us ensure our customers have a pleasant and safe dining experience. When a customer asks whether a certain food or ingredient is

included in a menu item, you *must* answer their questions carefully and accurately. If you are unsure of the exact ingredients of a particular food, say so and refer the question to the manager on duty.

MOST COMMON ALLERGENS

The foods most likely to cause serious reactions in people with allergies are:

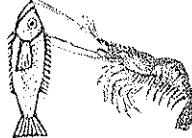
MILK



EGGS



FISH, SHELLFISH



WHEAT



SOY



PEANUTS



OTHER NUTS



SYMPTOMS OF ALLERGIC REACTIONS

Sometimes an allergic reaction can be so severe it may even cause death.

Call 911 and notify management if a customer experiences any of the following symptoms:

- ✘ loss of consciousness
- ✘ wheezing and hoarseness
- ✘ shortness of breath
- ✘ tightening of the throat
(difficulty swallowing)



- ✘ swelling of the face, eyelids, lips, hands or feet
- ✘ hives (welts)
- ✘ itching in and around the mouth, face, scalp, hands and feet

WHAT WE NEED TO DO

We can help prevent serious allergic reactions if we:

- ✘ Carefully clean utensils, containers, and grills
(to avoid cross-contamination between foods)
- ✘ When in doubt, refer customers' food allergy questions to management

FOR MORE INFORMATION



American Academy of Allergy,
Asthma and Immunology
611 East Wells Street
Milwaukee, WI 53202
1-800-822-2702



The Food Allergy & Anaphylaxis Network
11781 Lee Jackson Hwy,
Suite 160
Fairfax, VA 22033
(800) 929-4040
www.foodallergy.org



International Food Information
Council Foundation
1100 Connecticut Avenue, N.W.
Suite 430
Washington, D.C. 20036
www.ific.org



National Restaurant Association
1200 Seventeenth Street, NW
Washington, DC 20036

ALERGIA A LAS COMIDAS

LO QUE DEBEMOS SABER

Los clientes que tengan alergias a ciertas comidas necesitan nuestra atención especial. Para que nuestros clientes tengan una placentera experiencia es importante que sepamos unas cosas básicas sobre las alergias a las comidas. Cuando un cliente pregunta si algún

plato incluye una comida o ingrediente particular es importante responder con cuidado y con precisión. Si usted no está seguro sobre los ingredientes específicos de algún plato o comida, dígaselo al cliente y llame al gerente para obtener la respuesta correcta.

LOS ALERGENOS MAS COMUNES

Las comidas mas aptas a causar serias reacciones alérgicas son:

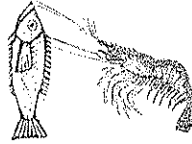
LA LECHE



LOS HUEVOS



EL PESCADO Y LOS MARISCOS



EL TRIGO



LA SOJA



EL CACAHUETE



OTRAS NUECES

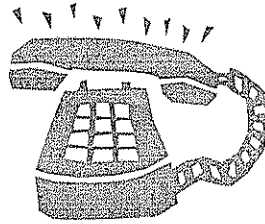


LOS SÍNTOMAS DE UNA REACCIÓN ALÉRGICA

Algunas veces una reacción alérgica puede ser tan severa que causa la muerte. **Llame al 911 y notifique al gerente si un cliente tiene cualquiera de los siguientes síntomas:**

- ✗ la persona está inconsciente
- ✗ resuella con dificultad o está ronca
- ✗ tiene la respiración trabajosa
- ✗ tiene dificultad tragando

LLAME AL 911



- ✗ tiene hinchazón de la cara, párpados, labios, manos o pies
- ✗ tiene urticaria
- ✗ tiene picazón en la boca, cara, cabeza, manos o pies

LO QUE DEBEMOS HACER

Podemos prevenir las reacciones alérgicas severas si:

- ✗ limpiamos los utensilios, los envases y las parrillas con mucho cuidado (para evitar la contaminación entre comidas o ingredientes)
- ✗ Cuando estemos en duda, referimos las preguntas de los clientes sobre alergias al gerente

PARA MÁS INFORMACIÓN



American Academy of Allergy,
Asthma and Immunology
611 East Wells Street
Milwaukee, WI 53202
1-800-822-2762



The Food Allergy & Anaphylaxis Network
11781 Lee Jackson Hwy.
Suite 160
Fairfax, VA 22032
(800) 929-4040
www.foodallergy.org



International Food Information
Council Foundation
1100 Connecticut Avenue, N.W.
Suite 430
Washington, D.C. 20036
www.ific.org



National Restaurant Association
1200 Seventeenth Street, NW
Washington, DC 20036

Food Allergy Action Plan

Student's Name: _____ D.O.B.: _____ Teacher: _____



ALLERGY TO: _____

Asthmatic Yes* No *Higher risk for severe reaction

◆ STEP 1: TREATMENT ◆

<u>Symptoms:</u>	<u>Give Checked Medication**:</u> <small>** (To be determined by physician authorizing treatment)</small>
▪ If a food allergen has been ingested, but <i>no symptoms</i> :	<input type="checkbox"/> Epinephrine <input type="checkbox"/> Antihistamine
▪ Mouth Itching, tingling, or swelling of lips, tongue, mouth	<input type="checkbox"/> Epinephrine <input type="checkbox"/> Antihistamine
▪ Skin Hives, itchy rash, swelling of the face or extremities	<input type="checkbox"/> Epinephrine <input type="checkbox"/> Antihistamine
▪ Gut Nausea, abdominal cramps, vomiting, diarrhea	<input type="checkbox"/> Epinephrine <input type="checkbox"/> Antihistamine
▪ Throat† Tightening of throat, hoarseness, hacking cough	<input type="checkbox"/> Epinephrine <input type="checkbox"/> Antihistamine
▪ Lung† Shortness of breath, repetitive coughing, wheezing	<input type="checkbox"/> Epinephrine <input type="checkbox"/> Antihistamine
▪ Heart† Weak or thready pulse, low blood pressure, fainting, pale, blueness	<input type="checkbox"/> Epinephrine <input type="checkbox"/> Antihistamine
▪ Other† _____	<input type="checkbox"/> Epinephrine <input type="checkbox"/> Antihistamine
▪ If reaction is progressing (several of the above areas affected), give:	<input type="checkbox"/> Epinephrine <input type="checkbox"/> Antihistamine

†Potentially life-threatening. The severity of symptoms can quickly change.

DOSAGE

Epinephrine: inject intramuscularly (circle one) EpiPen® EpiPen® Jr. Twinject® 0.3 mg Twinject® 0.15 mg (see reverse side for instructions)

Antihistamine: give _____
medication/dose/route

Other: give _____
medication/dose/route

IMPORTANT: Asthma inhalers and/or antihistamines cannot be depended on to replace epinephrine in anaphylaxis.

◆ STEP 2: EMERGENCY CALLS ◆

1. Call 911 (or Rescue Squad: _____). State that an allergic reaction has been treated, and additional epinephrine may be needed.

2. Dr. _____ Phone Number: _____

3. Parent _____ Phone Number(s) _____

4. Emergency contacts:
Name/Relationship

Phone Number(s)

a. _____ 1.) _____ 2.) _____

b. _____ 1.) _____ 2.) _____

EVEN IF PARENT/GUARDIAN CANNOT BE REACHED, DO NOT HESITATE TO MEDICATE OR TAKE CHILD TO MEDICAL FACILITY!

Parent/Guardian's Signature _____

Date _____

Doctor's Signature _____

Date _____

(Required)

TRAINED STAFF MEMBERS

1. _____
2. _____
3. _____

Room _____

Room _____

Room _____

EpiPen® and EpiPen® Jr. Directions

- Pull off gray activation cap.

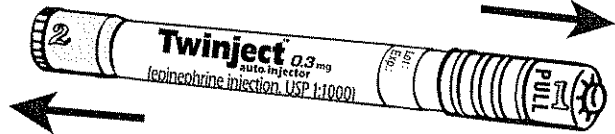


- Hold black tip near outer thigh (always apply to thigh).



- Swing and jab firmly into outer thigh until Auto-Injector mechanism functions. Hold in place and count to 10. Remove the EpiPen® unit and massage the injection area for 10 seconds.

Twinject® 0.3 mg and Twinject® 0.15 mg Directions



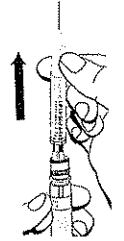
- Remove caps labeled "1" and "2."
- Place rounded tip against outer thigh, press down hard until needle penetrates. Hold for 10 seconds, then remove.



SECOND DOSE ADMINISTRATION:

If symptoms don't improve after 10 minutes, administer second dose:

- Unscrew rounded tip. Pull syringe from barrel by holding blue collar at needle base.
- Slide yellow collar off plunger.
- Put needle into thigh through skin, push plunger down all the way, and remove.



Once EpiPen® or Twinject® is used, call the Rescue Squad. Take the used unit with you to the Emergency Room. Plan to stay for observation at the Emergency Room for at least 4 hours.

For children with multiple food allergies, consider providing separate Action Plans for different foods.

***Medication checklist adapted from the Authorization of Emergency Treatment form developed by the Mount Sinai School of Medicine. Used with permission.*



ARCHDIOCESE OF LOUISVILLE FOOD LOSS RECORD

Claim Report must be filled out and sent to the
Food Service Office for all losses.

School: _____

Date Loss Discovered	Product Lost	Quantity Lost	Dollar Value	Circumstances Surrounding Loss

Signature

Date

Distribution: Monthly Folder
Central Food Service Office

Archdiocese of Louisville Food Service Information Sheet

Due to Central Office by: August 1, 2009

Completion and submission of this sheet is mandatory and will be on your annual review

School _____

Manager Name _____

Manager Address _____

Manager Home Phone _____ Cellular or pager _____

E-mail Address School: _____

Home _____

Annual Information Sheet

1. Please check the Program(s), which you operate:

National School Lunch _____, National School Breakfast _____,
After School Snacks _____, A La Carte Breakfast _____

2. Grades _____ thru _____ (list all grades you feed)

3. Dates of Operation: School Starts _____ School Ends _____

4. Estimated School Enrollment for School Year _____

5. Provide the amount charged for the following:

Snack

Preschool _____

Kindergarten _____

After School Care _____

Other _____

6. Are you currently a member of the following, (check all that apply)

_____ SNA -School Nutrition Association?

_____ KSNA- Ky School Nutrition Association?

_____ Local SNA Chapter?

Are you SNA certified? _____ Level _____

7. What is your serving period time? a. Breakfast _____ to _____

b. Lunch _____ to _____

8. Does your program charge a cafeteria fee? _____

If yes, how much? _____ What account is it deposited into? _____

9. Do you pre-plate lunches? _____ If so, what grades _____

10. What distributor do you use for fresh produce? _____

11. Does your program sell a la carte items? _____ If yes, list **all** items below.

<u>Items</u>	<u>Items</u>	<u>Items</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

12. List **all** cafeteria employees **including manager**, hours worked per day and number of days per week, and Health Department Certification information.

<u>Employee</u>	<u>Hours and Days</u>	<u>Pay</u>	<u>Health Dept. Certification Exp. Date</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

- **Attach a copy of the School Year 09/10 -school calendar.**
- **It is mandatory that each section of these forms is to be completed thoroughly and submitted by August 1, 2009 .**

ARCHDIOCESE OF LOUISVILLE

FOOD SERVICE JOURNAL ENTRY

JOURNAL ENTRY NUMBER: 1

ACCT MONTH/DAY: _____

Acct Number	Account Name	Debit	Credit
4212.82	Administration Fee (SEPT - MAY ONLY)		
4213.82	Supplies		
4214.82	Equipment<\$1000		
2328.82	Misc. Expense		
0151.82	Inventory		
4215.82	Non-Inventory Purchased Food/Milk		
0611.82	Accounts Payable/Cafeteria		
	TOTAL		

Purpose of Entry: To book goods/services received during the month but not yet paid.

Comments: Attach copies of invoices to support entry.

Prepared By: _____

Date: _____

Entered By: _____

Date: _____

FOOD SERVICE JOURNAL ENTRY

JOURNAL ENTRY NUMBER: 2

ACCT MONTH/DAY: _____

Acct Number	Account Name	Debit	Credit
0141.82	Accounts Receivable		
1714.82	USDA Reimbursement/Lunch		
1715.82	USDA Reimbursement/Breakfast		
1716.82	Other Income		
	TOTAL		

Purpose of Entry: To book amounts earned but not received during the month.

Comments: Attach documentation to support entry.

Prepared By: _____

Date: _____

Entered By: _____

Date: _____

ARCHDIOCESE OF LOUISVILLE

FOOD SERVICE JOURNAL ENTRY

JOURNAL ENTRY NUMBER: 3

ACCT MONTH/DAY: _____

Acct Number	Account Name	Debit	Credit
3641.82	Equipment Depreciation	●●●●●●●●	
0541.82	Accumulated Depreciation		●●●●●●●●
	TOTAL		

Purpose of Entry: To book depreciation expense for the month.

Comments: Attach Equipment Depreciation Schedule to support entry.

Prepared By: _____

Date: _____

Entered By: _____

Date: _____

FOOD SERVICE JOURNAL ENTRY

JOURNAL ENTRY NUMBER: 4

ACCT MONTH/DAY: _____

Acct Number	Account Name	Debit	Credit
4216.82	Cost of Food Used	●●●●●●●●	
0151.82	Cafeteria Food Inventory		●●●●●●●●
	TOTAL		

Purpose of Entry: To relieve inventory for cost of food used during the month.

Comments: Attach Schedule 7-D to support entry.

Prepared By: _____

Date: _____

Entered By: _____

Date: _____

ARCHDIOCESE OF LOUISVILLE

FOOD SERVICE JOURNAL ENTRY

JOURNAL ENTRY NUMBER: 5

ACCT MONTH/DAY: _____

Acct Number	Account Name	Debit	Credit
4218.82	Inventory Adjustment		
0151.82	Cafeteria Food Inventory		
	TOTAL		

Purpose of Entry: To book adjustments for transfers in/out, losses, etc. during the month.

Comments: Attach Schedule 7-D to support entry.

Prepared By: _____

Date: _____

Entered By: _____

Date: _____

FOOD SERVICE JOURNAL ENTRY

SCHOOL: _____

JOURNAL ENTRY NUMBER: 6

ACCT MONTH/DAY: _____

Acct Number	Account Name	Debit	Credit
4217.82	Inventory Over/Short		
0151.82	Cafeteria Food Inventory		
	TOTAL		

Purpose of Entry: To book adjustments to balance book to physical inventory for the month.

Comments: Attach Schedule 7-D to support entry.

Prepared By: _____

Date: _____

Entered By: _____

Date: _____

ARCHDIOCESE OF LOUISVILLE

FOOD SERVICE JOURNAL ENTRY

SCHOOL: _____

JOURNAL ENTRY NUMBER: 7

ACCT MONTH/DAY: _____

Acct Number	Account Name	Debit	Credit
2013.82	Cafeteria Payroll		
2111.82	Cafeteria Employer's FICA		
2113.82	Cafeteria Retirement Expense (eligible gross X 0.06)		
2114.82	Cafeteria Worker's Comp.		
2112.82	Cafeteria Fringe Expense		
4211.82	Indirect Cost		
0611.82	Accounts Payable/Cafeteria		
	TOTAL		

Purpose of Entry: To book payroll not yet paid.

Comments: Attach copies of check request to support entry.

Prepared By: _____

Date: _____

Entered By: _____

Date: _____

Debit Expense
Credit Accounts Payable

ARCHDIOCESE OF LOUISVILLE PLANNING AND PRODUCTION RECORD

LUNCH BREAKFAST _____ OFFER VS SERVE YES NO _____

MENU

FOOD REQUIREMENTS

FOOD ITEMS	PLANNED			ACTUAL			
	YIELD FROM FBG OR CN	PORTION SIZE (# & SIZE)	PORTIONS NEEDED	UNITS USED (#)	AMT NOT SERVED	COST PER UNIT	TOTAL FOOD COST
MEAT/MEAT ALTERNATIVE							
VEGETABLES/FRUITS							
BREAD							
OTHER							
DISPOSITION OF AMOUNT NOT SERVED (ABOVE)				COST PER MEAL SERVED			
FOOD ITEM	COMMENTS			TOTAL FOOD COST			
				MEALS SERVED			
				*STUDENT/REIMB			
				*ADULT/OTHER/MISC			
				TOTAL MEALS SERVED			
				COST PER MEAL SERVED			

ARCHDIOCESE OF LOUISVILLE
REQUEST TO PURCHASE FOOD SERVICE EQUIPMENT

SCHOOL _____ DATE _____

DESCRIPTION OF ITEM _____

REASON NEEDED _____

PURCHASE COST (ATTACH 3 BIDS) _____

ALTERNATIVE TO THIS REQUEST _____

IS THIS ITEM BUDGETED _____

REQUESTED BY _____ DATE _____

PARISH APPROVAL _____ DATE _____

FOOD SERVICE/FINANCE APPROVAL _____ DATE _____

Employee Name		Name of Parish/School				Month / Year		Codes:	
Mon/Day	Time In	Time Out	Time In	Time Out	Time In	Time Out	Total Hours	Code	
							0		
							0		
							0		
Total Hours:							0	Reg	
								OT	
Employee Signature							Date		
Authorized by:									

ARCHDIOCESE OF LOUISVILLE TRANSFER OF PRODUCTS

TRANSFERRED FROM: _____

TRANSFERRED TO: _____

PRODUCT	NUMBER OF UNITS	VALUE

NAME OF PERSON MAKING TRANSFER

DATE

NAME OF PERSON RECEIVING TRANSFER

DATE

Form Distribution: Monthly Folder - Transferring Program
Monthly Folder - Receiving Program
Central Food Service Office